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GROUP AND CROSS-MEDIA OWNERSHIP OF TELEVISION STATIONS: 1984

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GROUP AND CROSS-MEDIA OWNERSHIP OF TELEVISION STATIONS: 1984

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A RESEARCH REPORT

FOR

THE NATIONAL ASSOCIATION OF BROADCASTERS

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by

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GROUP AND CROSS-MEDIA OWNERSHIP OF TELEVISION STATIONS: 1984

In 1953, the Federal Communications Commission established a set of limits on broadcast ownership to prevent excessive control of the electronic media by any single entity. These limits, commonly called the "7-7-7 rule," prohibit any licensee from owning more than 7 AM, 7 FM, and 7 TV stations in the United States.[1] The Commission also ruled that no more than 5 of any licensee's 7 television stations may be VHF facilities. In 1983, the Commission issued a Notice of Proposed Rule Making to consider the modification or elimination of the "seven station" ownership limit.[2]

Two other ownership rules are unaffected by the FCC's rulemaking proposal—the duopoly rule which forbids common ownership of more than one station in each of the broadcast services in a given market and the cross-media ownership rule which forbids ties between daily newspapers and broadcast stations in the same market.

The duopoly rule,[3] adopted in 1943, provided that the FCC would no longer grant a license for a new standard broadcast station to any party that already had an AM station serving the same primary area. A second action, issued in 1944, required all companies that held licenses for two AM stations in the same market to divest one to comply with the new rule.[4] The duopoly

rule was extended later to include FM and TV stations.

Although concerns were expressed about local cross-media ownership as early as 1933, the FCC took no action to restrict this widespread practice until 1975 when it adopted rules prohibiting the licensing of new media combinations involving TV stations, newspapers, and radio outlets in the same community.[5]

This study was undertaken to provide current data on the extent of television station multiple ownership and cross-media ownership involving co-located TV stations and daily newspaper properties. One of a continuing series of research studies by the author, this report presents a statistical profile of television station ownership as of January 1, 1984.

Historical Background

Group ownership of radio and television stations has long been a notable characteristic of broadcasting in the United States. Numerous radio groups existed before World War II, and TV group ownership began to emerge almost immediately after commercial television was launched in the late 1940s. As shown in Table 1, TV group ownership has grown steadily since the

TABLE 1

GROUP OWNERSHIP OF TV STATIONS IN THE TOP-100 MARKETS
(SELECTED YEARS)

	1956[6]	1965[7]	1973[8]	1975[9]	1980[10]	1983[11]
VHF	50.4%	62.0%	75.2%	76.0%	82.4%	85.6%
UHF	N.A.	N.A.	57.5%	57.4%	61.8%	63.9%
VHF & UHF	N.A.	N.A.	70.2%	70.8%	75.3%	76.7%

present limits were established. In 1956, only three years after the multiple-ownership limits were adopted, one-half of the VHF stations in the top-100 markets were group-owned. Today, 17 of every 20 VHF stations in these markets are licensed to multiple-station owners.

Historically, group ownership of UHF stations developed at a slower pace. During recent years, acquisition of UHF outlets by group owners has accelerated as the value of those stations has increased. However, the percentage of UHF stations licensed to groups has declined since 1982, largely because of a dramatic increase in the number of new stations, most of which have been established by non-group licensees.

The second aspect of this study concerns newspaper ownership of television stations. In 1973, when the FCC examined the issue of local cross-media ownership, 16.1% of the commercial TV stations in the top-100 markets (60 of 372) were licensed to or affiliated in ownership with a local daily newspaper.[12] By 1983, a noticeable decline in cross-media ownership had occurred, while newspaper-television affiliations overall had increased. Only 36 TV stations, or 8.0% of the 447 outlets in the top-100 markets, were affiliated with co-located daily newspapers.[13] However, 149 of those 447 stations, or 33.3%, were newspaper-related, compared with 28.0% in 1973.[14]

In this study of media ownership in 1984, we have sought to determine the following information:

1. Has the long-term uptrend in television station group ownership continued through 1983?

2. Has local cross-media ownership of TV/newspaper proper-

ties continued to decline?

3. Have TV/newspaper affiliations other than those involving cross-media ownership continued to increase?

4. Are there consistent patterns of audience reach and economic potential among group owners having similar numbers of stations?

Method of Study

This study is based on a tabulation of new data on multiple and cross-media ownership in U. S. television broadcasting, based on station holdings as of January 1, 1984. The author maintains files of TV station ownership which are continuously updated from FCC announcements published in BROADCASTING and other trade magazines. The 1984 BROADCASTING-CABLECASTING YEARBOOK[15] and TELEVISION FACTBOOK No. 52 [1984 ed.][16] provided further verification of station holdings by various groups. TELEVISION FACTBOOK also was the source of Arbitron's weekly circulation data.

The various tables presented here use as a base the 509 TV stations (286 VHF and 223 UHF) listed as operational in the 100 largest markets by TELEVISION FACTBOOK. Market rankings are those published by The Arbitron Company for 1983-84.[17] This list, based on the number of TV households in each market area, is revised annually, resulting in slight changes from year-to-year in the make-up of these markets.

The Findings

Based on the data examined, group ownership of TV stations in the top-100 markets declined slightly during 1983. Overall,

374 of the 509 VHF/UHF stations operating in these markets, or 73.5%, were licensed to various group owners on January 1, 1984. Collectively, the groups continued to operate more than 80.0% of the VHF stations in these markets [83.9 in 1984 vs. 85.6% in 1983]. Group ownership of the UHF stations increased significantly [from 117 to 134]; however the percentage declined [from 63.9% to 60.1%] as some 40 new UHF stations commenced operation in these markets. Thus, group ownership has continued to expand numerically, while declining slightly on a percentage basis since the peak year of 1982 when the percentages were as follows: VHF, 85.9%; UHF, 67.5%; and VHF/UHF, 79.0%.[18]

As shown in Table 2, group ownership predominates at every level within the top-100 markets for both VHF and UHF stations. Despite the prevalence of group broadcasting, a significant degree of ownership diversity exists within this practice. Well over 100 different groups are represented among the 374 chain-

TABLE 2

GROUP OWNERSHIP OF TV STATIONS BY MARKET RANK

January 1, 1984

Market Rank	VHF No.	VHF G/O	VHF %	UHF No.	UHF G/O	UHF %	Both VHF & UHF No.	Both VHF & UHF G/O	Both VHF & UHF %
1-10	42	40	95.2	52	31	59.6	94	71	75.5
1-25	98	90	91.8	88	53	60.2	186	143	76.9
26-50	68	59	86.7	53	30	56.6	121	89	73.5
51-75	70	58	82.8	38	22	57.9	108	80	74.1
76-100	50	33	66.0	44	29	65.9	94	62	66.0
TOTAL: (1-100)	286	240	83.9	223	134	60.1	509	374	73.5

operated stations in the top-100 markets. Furthermore, in markets of all sizes, some 175 different groups (excluding those that operate satellite transmitters exclusively as repeater stations) owned completely or partially the licenses to 622 stations, an average of 3.6 stations each. However a total of 613 different stations were group owned on January 1, 1984, since 9 stations were shared by two or more groups.

Table 3 indicates ownerships that hold the various numbers of stations permissible under the present FCC rules. Significantly, the number of groups holding the current maximum of 7 stations increased from 9 to 12 during the past year. Four new additions to the maximum-station list—Meredith, Pulitzer, Lin, and Standard Communications—appeared during 1983, while one licensee, Gannett Broadcasting, dropped from 7 to 6 stations. The eight other firms holding the full complement of 7 TV stations include Bahakel, Gaylord, Metromedia, Park, Spanish International, Storer, Taft, and Times-Mirror. [At least five more groups are expected to join these maximum-station owners during 1984, based on announced station purchase plans.]

Although FCC rules presently limit group ownership on the basis of the number of stations held, the economic potential of individual stations, and consequently that of group owners, varies greatly. In addition to the number of its stations, a group's economic potential also depends upon the size audience its stations are capable of reaching (determined by market size and coverage), and the overall attractiveness of the programming. Therefore, a more meaningful comparison of group broadcasting must consider the audience reach of the stations involved.

TABLE 3

GROUP OWNERSHIP BY NUMBER OF TV STATIONS

January 1, 1984

Number of Stations	No. Groups	No. Stations
7	12	84
6	12	72
5	15	75
4	36	144
3	47	141
2	53	106
TOTAL:	175 (1)	622 (2)

NOTES: (1) Excludes 11 satellite-only groups (26 stations).

(2) Ownership of 9 stations is shared by 2 or more groups. Therefore, 613 different stations are represented in this number.

Arbitron's net weekly circulation (NWC) data provide a readily available index of regular station viewership.[19]

Using net weekly circulation data published in TELEVISION FACTBOOK No. 52 (1984), an audience reach profile was developed for each of the 175 identified broadcast groups based on their TV station holdings on January 1, 1984. These groups, ranked according to the combined circulation of their respective stations, are shown in Appendix 1.

New groups in 1984 include Camellia City (70), Ackerley (80), Odyssey Partners (104), Caprock (135), David Smith (108), Roy Hess (138), Eagle Communications (160), Schindler (161),

and the Burke group (150). Significant gains in rank were registered during the past year by Metromedia (1), Tribune Co. Broadcasting (5), Taft (10), Gannett (13), Lin (18), Meredith (19), A. H. Belo (20), United Communications (21), Pulitzer (24), Knight-Ridder (25), Albritton (26), Viacom (41), Malrite (49), and Freedom Newspapers (52).

Further analysis of the 175 groups reveals the following industry profile:

1) No individual group reaches more than 20% of the nation's estimated 83,971,300 television households (1983-84).[20] Only five groups reach as much as 15%, and only seven groups serve 10% to 20% of the nation's TV homes. These firms include the three network owned-and-operated (O&O) groups and four large independent chains.

In this year's ranking, Metromedia emerged as the television group with the greatest circulation (19.9%), followed by the three network O&O organizations—ABC (18.9%), CBS (18.8%), and NBC (18.0%). The three remaining independents among this select company were Tribune Co. Broadcasting (16.4%), Westinghouse (11.1%), and RKO General (10.7%). All seven of these broadcasting groups gained in circulation; however the two most significant increases were scored by Metromedia (16,675,400 vs. 15,425,100) and by Tribune Co. (13,757,800 vs. 10,124,400). Metromedia's gains are largely attributable to the upgrading of the company's TV properties, while Tribune Company's hefty gain reflects increased popularity of WGN-TV, its Chicago "super

station," and the addition of two new stations to its holdings.

2) Ten groups reach between 5% and 10% of the nation's TV households. These companies include Storer (9.1%), Gaylord (8.2%), Taft (8.1%), Capital Cities (7.5%), Cox (7.3%), Gannett (6.5%), Hearst (5.5%), Scripps-Howard (5.4%), Times-Mirror (5.1%), and Post-Newsweek (5.1%). Again, all 10 firms gained in circulation. Of this group, the most dramatic increases were scored by Gannett (5,458,700 vs. 3,902,000 last year) and Taft (6,787,200 vs. 5,947,800 in 1983), both of which upgraded their station properties during 1983.

3) Twenty groups reach between 2.5% and 5.0% of the nearly 84 million television households on a weekly basis, while 42 groups reach between 1.0% and 2.5% penetration. Finally, 96 groups, more than half of all multiple-station operators, reach less than 1.0% of the nation's TV households each week. Of these 96 smaller broadcast firms, 69 have weekly circulations of less than 500,000 households (0.6%) and 36 groups reach fewer than 250,000 homes (0.3%) on a weekly basis. The smallest group for which circulation data were available attracts only 36,200 viewing households weekly to its two stations.

The difficulty of applying a numerical limitation to TV station holdings arises from the fact that no two stations are equal. Thus, wide differences exist among groups holding the same number of stations. Table 4 shows the highest and lowest net weekly circulations and rankings for groups with seven, six, five, four, three, and two stations respectively.

TABLE 4

HIGH AND LOW CIRCULATION DATA ON TV GROUPS (1984)

No. Stations	Highest Rank	Highest Circulation	Lowest Rank	Lowest Circulation
Seven	1	16,675,400	74	913,200
Six	6	9,291,000	157	142,500
Five	2	15,869,100	111	454,600
Four	17	4,244,000	158	63,600
Three	7	8,994,200	162	82,400
Two	22	3,668,500	168	36,200

Disparities between groups with equal numbers of stations are quite obvious. Although the highest ranking group has seven stations, another full-complement group trails 73 other chains, most of which have fewer than 7 stations. One three-station group (RKO General) outranks all but one of the 12 groups that have 7 stations, while the largest two-station group (Chris Craft) leads five 7-station operators.

From a different perspective, if the eighth and ninth ranked groups (Storer and Gaylord) were combined, their net weekly circulation of 14,518,300 still would be less than that of the three network O&O groups, ranked second, third, and fourth. However, between them, these two companies have 14 stations compared with only five for each network. Finally, if the 49 different stations held by the 11 groups ranked 48th through 58th were combined, their aggregate weekly circulation of 14,367,500 also would result in a fifth place ranking behind Metromedia and the three network groups.

Cross-Media Ownership

Two significant trends continue in regard to newspaper ownership and affiliation with television stations. First, the steady increase in overall TV affiliations with newspaper publishing companies continues. As shown in Table 5, 169 of the 509 stations in the top-100 markets were newspaper-related at the beginning of 1984. This represents an increase of 20 stations over the number reported in 1983. Although the percentage of group ownership of VHF stations increased slightly (from 45.1% to 47.2%), the overall VHF-UHF percentage of newspaper-related TV stations was virtually the same as for last year at 33.2% vs. 33.3%. This figure, however, represents a substantial increase over the 28.0% reported for 1973.[21]

Second, a decline in instances of local cross-media ownership of TV stations and daily newspapers has continued in the 100 largest markets. On January 1, 1984, only 32 stations, a mere 6.3% of the 509 television outlets in those markets, were involved in local cross-media ownerships. This represents a net decline of 4 stations since last year and a significant decline of 28 stations since 1973 when 60 TV stations, or 16.1% of those in the top-100 markets, were commonly-owned with local dailies. With only four exceptions, the remaining 32 newspaper/television cross-ownerships involve VHF station properties.

Three principal reasons help explain the recent trends in newspaper/TV crossownership:

1. Owners usually find it advantageous from a tax standpoint to divest themselves of TV stations that are co-located with their newspaper properties. Divestiture also removes the

TABLE 5

NEWSPAPER OWNERSHIP OF U. S. TELEVISION STATIONS

January 1, 1984

MARKET RANK	VHF			UHF			VHF & UHF		
	Total	No.	%	Total	No.	%	Total	No.	%
1-10 (1)	42	15	35.7	52	3	5.7	94	18	19.1
1-25 (2)	98	40	40.8	88	7	7.9	186	47	25.3
26-50 (3)	68	37	54.4	53	12	22.6	121	49	40.5
51-75 (4)	70	38	54.3	38	4	10.5	108	42	38.9
76-100 (5)	50	20	40.0	44	11	25.0	94	31	33.0
TOTAL 1-100 (6)	286	135	47.2	223	34	15.2	509	169	33.2

NOTES: 1) 6 VHF stations are cross-owned with local newspapers.

2) 10 VHF stations are cross-owned with local newspapers.

3) 8 VHF and 2 UHF stations are cross-owned with local newspapers.

4) 5 VHF stations are cross-owned with local newspapers.

5) 5 VHF and 2 UHF stations are cross-owned with local newspapers.

6) 28 VHF and 4 UHF stations are cross-owned with local newspapers in the top-100 markets.

uncertainties involved with continued operation of both media in the same market and allows the company to acquire broadcast properties elsewhere;

2. The FCC tacitly sanctions newspaper ownership of broadcast properties where publishers do not engage simultaneously in the newspaper publishing business; and

3. Media firms continue to acquire additional properties, often including holdings in cable and other communications enterprises, as well as publishing and TV/radio broadcasting.

ENDNOTES

[1] Amendment of Multiple Ownership Rules, 9 R.R. 1563 (1953); Television Multiple Ownership Rule Amended, 1 R.R. 1519 (1954).

[2] Multiple Ownership of AM, FM and Television Stations, 48 F.R. 49438 (1983).

[3] FCC Order 84-A (1943).

[4] FCC Order 84-B (1944).

[5] Second Report and Order (Docket 18110), 32 R.R. 2d 954 (1975).

[6] FCC, Network Broadcasting: Report of the Network Study Staff to the Network Study Committee (Washington: U. S. Government Printing Office, 1958), p. 563.

[7] Television Multiple Ownership Rule, 5 R.R. 2d 1609 at 1614 (1965).

[8] Herbert H. Howard, Multiple Ownership in Television Broadcasting (New York: Arno Press, 1979), p. 178.

[9] Herbert H. Howard, "The Contemporary Status of Television Group Ownership," Journalism Quarterly, 53:403 (Autumn 1976).

[10] Herbert H. Howard, Television Station Group Ownership: 1980 (Knoxville: The University of Tennessee Communications Research Center for the National Association of Broadcasters, 1982), p. 4.

[11] Herbert H. Howard, Television Station Group Ownership and Cross-Media Ownership: 1983 (Washington: National Association of Broadcasters, 1983), p. 5.

[12] Herbert H. Howard, "Cross-Media Ownership of Newspapers and TV Stations," Journalism Quarterly, 51:717 (Winter 1974).

13 Herbert H. Howard, Television Station Group Ownership and Cross-Media Ownership: 1982, p. 7.

14 Ibid., p. 8.

15 1984 Broadcasting-Cablecasting Yearbook. (Washington: Broadcasting Publications, Inc., 1984).

16 Television Factbook No. 52 (Washington: Television Digest, Inc., 1984).

17 ADI Market Rankings 1983-84. (New York: The Arbitron Co., 1983). The composition of the top-100 markets varies slightly from year to year due to different growth rates among the markets and the shifting of "swing" counties from one market to another. For analytical purposes, however, the effect of these differences is negligible.

18 Herbert H. Howard, Television Station Group Ownership and Cross-Media Ownership: 1982 (Knoxville: The University of Tennessee Communications Research Center for the National Association of Broadcasters, 1982), p. 4.

19 Net weekly circulation data, produced by The Arbitron Company, indicate the estimated total number of different households reached at least once a week by a given station.

20 Estimate by The Arbitron Co., October 1983.

21 Howard, Television Station Group Ownership and Cross-Media Ownership: 1982, p. 8.

APPENDIX I

TV STATION GROUPS BY NET WEEKLY CIRCULATION

January 1, 1984

Group Owner	Rank 1983	Rank 1984	No. of Stations	Net Weekly Circulation	Percent of U.S. TV Households
Metromedia	3	1	7	16,675,400	19.9%
ABC	2	2	5	15,869,100	18.9
CBS	1	3	5	15,790,500	18.8
NBC	4	4	5	15,108,200	18.0
Tribune Co. Broadcasting	5	5	5	13,757,800	16.4
Westinghouse	6	6	6	9,291,000	11.1
RKO General	7	7	3	8,994,200	10.7
GROUPS WITH 5.0% TO 10.0% PENETRATION OF THE U.S. TV MARKET					
Storer	8	8	7	7,644,700	9.1
Gaylord	10	9	7	6,873,600	8.2
Taft	13	10	7	6,787,200	8.1
Capital Cities	12	11	6	6,276,700	7.5
Cox	11	12	6	6,102,100	7.3
Gannett	18	13	6	5,458,700	6.5
Hearst	14	14	5	4,627,200	5.5
Scripps-Howard	15	15	6	4,559,200	5.4
Times- Mirror	17	16	7	4,296,700	5.1
Post-Newsweek	16	17	4	4,244,000	5.1
GROUPS WITH 2.5% TO 5.0% PENETRATION OF THE U.S. TV MARKET					
Lin	33	18	7	3,970,400	4.7
Meredith	23	19	7	3,935,600	4.7
A. H. Belo	42	20	5	3,905,900	4.7

United Television (1)	32	21	4	3,839,600	4.6
Chris Craft (1)	21	22	2	3,668,500	4.4
Outlet/Rockefeller	22	23	5	3,607,300	4.3
Pulitzer	31	24	7	3,420,900	4.1
Knight-Ridder	30	25	6	3,019,700	3.6
Albritton	41	26	5	2,993,500	3.6
Evening News Assn.	24	27	5	2,965,300	3.5
Cosmos	27	28	6	2,698,800	3.2
Multimedia	25	29	5	2,647,760	3.2
Chronicle Bcstg.	26	30	4	2,599,400	3.1
Wometco	29	31	6	2,567,100	3.1
McGraw-Hill	28	32	4	2,557,700	3.0
King	36	33	4	2,328,700	2.8
Hubbard	34	34	4	2,313,300	2.8
Houston Post	37	35	4	2,231,700	2.7
Park	35	36	7	2,191,500	2.6
Gulf United	38	37	3	2,180,400	2.6
GROUPS WITH 1.0% TO 2.5% PENETRATION OF THE U.S. TV MARKET					
CBN	39	38	3	1,930,900	2.3
Harte-Hanks	43	39	4	1,802,100	2.1
Fisher	44	40	2	1,796,900	2.1
Viacom	71	41	4	1,787,300	2.1
Kelly	58	42	2	1,632,100	1.9
Lee Enterprises	47	43	4	1,579,800	1.9
Bonneville	51	44	2	1,547,900	1.8
Midwest R & TV	48	45	3	1,541,700	1.8
Columbus Dispatch	46	46	2	1,540,300	1.8

Media General	50	47	3	1,483,300	1.7
Forward	49	48	6	1,434,300	1.7
Malrite	109	49	4	1,409,700	1.7
Gateway	54	50	4	1,338,600	1.6
American Family	56	51	5	1,316,100	1.6
Freedom Newspapers	84	52	4	1,309,600	1.6
Television Ptnrs.	52	53	4	1,306,000	1.6
Koplar	67	54	2	1,295,100	1.5
Midwest Television	55	55	3	1,293,300	1.5
Standard Comm.	65	56	7	1,259,800	1.5
Bahakel	60	57	7	1,210,700	1.4
Springfield TV	64	58	3	1,194,300	1.4
Post Corporation	57	59	5	1,192,300	1.4
Nationwide	59	60	3	1,184,000	1.4
New York Times(2)	62	61	3	1,124,100	1.3
Rollins	66	62	3	1,084,900	1.3
Jefferson-Pilot	63	63	2	1,076,200	1.3
Charles Woods	73	64	4	1,069,300	1.3
Commercial Radio Institute	72	65	2	1,068,600	1.3
Harriscope	45	66	6	1,033,000	1.2
Evening Telegram	74	67	5	1,025,700	1.2
Cowles (2)	75	68	2	1,024,800	1.2
Fetzer	69	69	4	958,100	1.1
Camellia City	—	70	2	937,700	1.1
Loyola University	77	71	2	934,000	1.1
Milwaukee Journal	79	72	2	925,700	1.1
Guy Gannett	69	73	3	925,600	1.1

Spanish Int'l.	83	74	7	913,200	1.1
South Bend Tribune	80	75	3	909,000	1.1
Benedek	107	76	4	896,000	1.1
Palmer	76	77	3	873,700	1.0
Wilson	78	78	3	860,700	1.0
Quincy Newspapers	81	79	4	842,400	1.0
GROUPS WITH LESS THAN 1.0 PENETRATION					
Ackerley	—	80	3	748,300	0.9
Balaban/Plains	125	81	3	726,800	0.9
Clay	86	82	4	714,600	0.9
News Press/ Gazette	121	83	3	697,300	0.8
Byron H. Lasky	131	84	4	695,800	0.8
Liberty	91	85	5	681,600	0.8
Schlenker	159	86	3	679,800	0.8
Gilmore	89	87	3	679,300	0.8
Landmark	88	88	2	674,900	0.8
Malcolm Glazier	87	89	3	669,600	0.8
Gross	95	90	2	662,900	0.8
May Co.	96	91	2	661,700	0.8
Bostick	90	92	4	661,300	0.8
Buford	136	93	6	658,000	0.8
Western	92	94	4	632,200	0.8
Blair Television	100	95	4	622,000	0.7
TV Corp. of Va.	132	96	4	619,500	0.7
Birney Imes	98	97	4	609,400	0.7
Gray	101	98	3	599,000	0.7
Harron	99	99	2	574,100	0.7

Toledo Blade	145	100	3	565,500	0.7
Oak	61	101	3	564,300	0.7
Manship	103	102	2	554,300	0.7
Robert Dudley	94	103	3	547,400	0.7
Odyssey Partners	—	104	3	545,700	0.6
Charleston Evening Post	105	105	3	533,400	0.6
Maine Bcstg.	116	106	2	511,600	0.6
J. C. Lewis	111	107	3	495,100	0.6
David Smith	—	108	2	492,200	0.6
Sarkes-Tarzian	53	109	2	490,200	0.6
Retlaw	110	110	2	469,100	0.6
Fargo Forum	108	111	5	454,600	0.5
Bluefield Daily Telegraph	118	112	2	448,500	0.5
Frank H. Spain	122	113	3	434,500	0.5
R. H. Drewry	113	114	3	434,300	0.5
Gay-Bell	114	114	2	434,300	0.5
Mid-America	117	116	2	410,200	0.5
Michigan Center (Adams)	158	117	3	405,000	0.5
Devonshire Capital	112	118	2	397,800	0.5
Beach-Schmidt	115	119	4	393,800	0.5
Eugene TV	124	120	4	382,800	0.5
Marsh Media	120	121	4	382,600	0.5
Great Trails	130	122	2	370,400	0.4
Stauffer	123	123	2	364,700	0.4
Central Minnesota	119	124	3	360,600	0.4

McKinnon	126	125	3	354,200	0.4
Register Bcstg.	127	126	4	345,700	0.4
Johnny Carson	144	127	2	334,100	0.4
Cal-Oregon	128	128	4	333,300	0.4
Worrell	134	129	3	315,700	0.4
Howard Green	138	130	3	312,600	0.4
Home News	135	131	2	311,500	0.4
Lanford	85	132	3	292,400	0.3
Shamrock	140	133	4	273,600	0.3
Community (Diversified)	139	134	3	275,700	0.3
Caprock	—	135	2	271,200	0.3
S.L.J./Montana TV	137	136	4	266,600	0.3
Adelstein & Berger	157	137	2	264,100	0.3
Roy Hess	—	138	2	261,400	0.3
G. T. Hernrich	141	139	3	261,000	0.3
Meyer Communi-cations	142	140	2	246,700	0.3
Beam (Service)	143	141	3	233,900	0.3
Pikes Peak	146	142	2	232,600	0.3
Seaway Communi-cations/Bangor	148	143	2	200,100	0.2
Cary Jones	160	144	2	198,100	0.2
NWG Broadcasting	152	145	3	192,700	0.2
Wooster Repub-lican	151	146	2	183,400	0.2
Dakota Broad-casting	150	147	3	179,200	0.2
United Communica-tions (Kenosha)	147	148	2	177,700	0.2

Le Sea Bcstg.	153	149	2	161,700	0.2
Burke	—	150	4	160,700	0.2
Columbia Empire	156	151	2	152,600	0.2
Hi-Ho	162	152	3	151,000	0.2
McAlister TV	154	153	2	146,100	0.2
R.H. Shively	155	154	3	145,200	0.2
Meyer	—	155	4	144,700	0.2
Sante Fe	—	156	3	143,000	0.2
Trinity	167	157	6	142,500	0.2
Duhamel	—	158	4	121,600	0.1
KXMC-TV, Inc.	—	159	3	121,100	0.1
Eagle Communi-cations	—	160	3	110,900	0.1
Schindler	—	161	2	103,000	0.1
XYZ-TV	163	162	3	82,400	0.1
Pacific Media	161	163	2	81,900	0.1
Carolina Christian	164	164	2	63,600	0.1
Media Central	168	165	2	63,500	0.1
Northern Plains	—	166	2	59,900	0.1
Satellite Syndi-cated System	168	167	2	45,900	0.05
Sainte Bcstg.	—	168	2	36,200	0.05
National Capitol Christian	168	169	2	N. A.	—
Northern TV	165	169	2	N. A.	—
Alaska 13 TV	166	169	2	N. A.	—
Faith Center	168	169	3	N. A.	—
Zazer & Langston	168	169	4	N. A.	—
American Colonial	168	169	2	N. A.	—

Stephen Kent	—	169	2	N. A.	—

NOTES: (1) Chris Craft and United Television are closely interrelated through stock holdings.

(2) Cowles Communications and the New York Times Co. are closely interrelated through stock holdings.

# # #

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A SPECIAL REPORT FROM

Research & Planning

GROUP AND CROSS-MEDIA OWNERSHIP OF TELEVISION STATIONS: 1985

INCLUDING TABLES FOR CALCULATING AUDIENCE REACH UNDER THE 12–STATION RULE

National Association of Broadcasters
1771 N Street, N.W.
Washington, D.C. 20036-2898

GROUP AND CROSS-MEDIA OWNERSHIP OF TELEVISION STATIONS: 1985

by

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National Association of Broadcasters

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GROUP AND CROSS-MEDIA OWNERSHIP OF TELEVISION STATIONS: 1985

The year 1985 marks a new beginning for group ownership of broadcasting stations in the United States. Beginning April 2, 1985, each group owner may hold licenses for as many as 12 television stations, as long as the group's total audience reach does not exceed 25% of the nation's TV households. Ownership limitations on radio groups also were relaxed in the Federal Communications Commission's 1984 multiple ownership order, with each owner permitted to hold up to a maximum of 12 AM and 12 FM stations after March 4, 1985.[1] The new limits replace the former "7-7-7 rule" adopted originally in 1953 and amended in 1954.[2]

In deciding to liberalize the multiple-ownership rules, the FCC concluded that there is no longer a need for federal regulations to foster its traditional policy objectives of promoting a diversity of viewpoints and preventing undue economic concentration. However, the Commission expressed concern that an abrupt removal of all limitations might provoke a "precipitous and potentially disruptive restructuring of the broadcast industry."[3]

The final order,[4] adopted December 19, 1984, modified the Commission's Report and Order of July 26, 1984,[5] which contained the new "12-12-12" limits and a provision that the rules be eliminated entirely at the end of six years. In the final version, the FCC abandoned the "sunset" provision and adopted a

new dual limitation of 12 TV stations and market coverage not to exceed 25% of the nation's TV households.

Under the new rule, household coverage for each group owner is based on the Arbitron Company's estimate of TV households (in percentages of the national total) in the ADI markets where the group's stations operate. Because of coverage differences between VHF and UHF television, UHF stations only count 50% of the market percentages toward the 25% ceiling. Furthermore, the discount applies to all UHF stations since the Commission did not distinguish between UHF stations in mixed and all-UHF markets.

In addition to liberalizing the number of television stations allowed per owner, the FCC's 1984 multiple ownership rules also dropped the proviso that a full complement of stations must include at least two UHF facilities. The portfolio of stations now may consist of any 12 non-overlapping stations.[6]

Two other ownership rules are unaffected by the FCC's recent action. The duopoly rule, adopted in 1943, as amended, forbids common ownership of more than one station of each type in a given market area.[7] The cross-media ownership rule forbids the establishment of new media combinations involving TV stations, newspapers, and radio outlets in the same community.[8] The number of commonly-owned local TV-newspaper combinations has dropped sharply since the adoption of the cross-media rule in 1975.

This study was undertaken to provide current data on (1) TV station multiple ownership, (2) cross-media ownership involving co-located television stations and daily newspaper properties, and (3) newspaper-TV affiliations not involving cross-media

ownership. Particular attention has been given to ownership trends on these three items. In addition, the percentages of the nation's television households reached by various station groups has been tabulated, using the FCC's newly adopted TV national market reach formula, as well as net weekly circulation values.

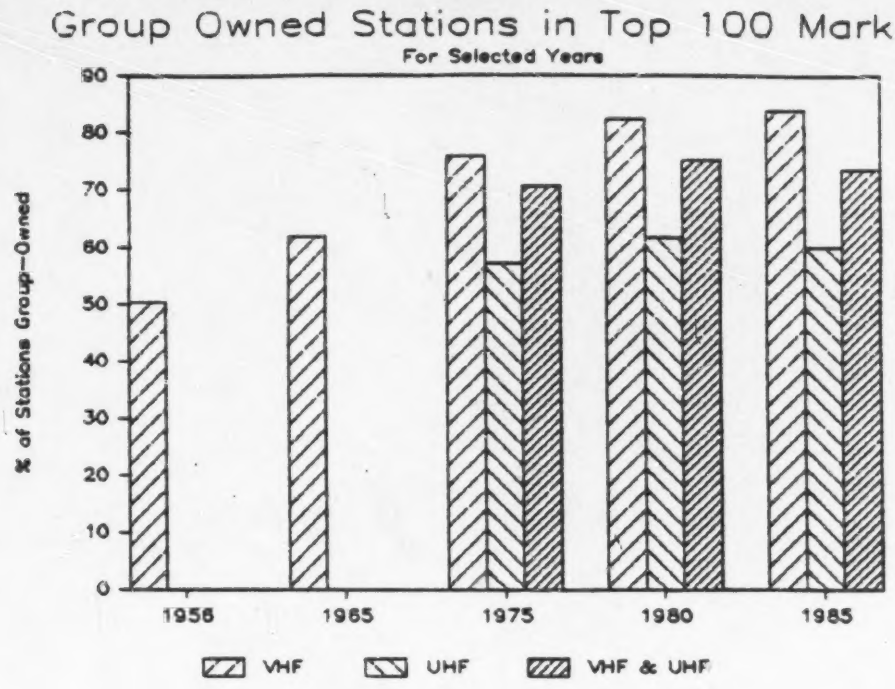
One of a continuing series of research studies by the author, this report presents a statistical profile of television station ownership as of January 1, 1985.

Historical Background

Group ownership of radio and TV stations is a firmly established characteristic of broadcasting in the United States. Numerous radio groups existed prior to World War II, and TV group ownership emerged with the beginning of television service in the late 1940's. As shown in Figure 1, TV group ownership has grown steadily since rules governing the practice were first adopted. In 1956, three years after adoption of station ownership rules, more than one-half of the VHF stations in the top-100 markets were group owned. Today, nearly 9 of every 10 VHF outlets in those markets are licensed to multiple-station owners.

Historically, group ownership of UHF stations developed at a slower pace than that of VHF properties. However, during recent years, acquisition of UHF outlets by group owners has accelerated sharply as the economic potential of those stations has increased. At the same time, the percentage of group-owned UHF stations has remained fairly constant because of a steady

FIGURE 1



Sources:

1956 - FCC, Network Broadcasting: Report of the Network Study Staff to the Network Study Committee. (Washington: U.S. Government Printing Office, 1958), p. 563.

1965 - Television Multiple Ownership Rule, 5 R.R. 2d 1609 at 1614 (1965)

1975 - Herbert H. Howard, "The Contemporary Status of Television Group Ownership," Journalism Quarterly, 53:403 (Autumn 1976).

1980 - Herbert H. Howard, Television Station Group Ownership: 1980. (Knoxville: The University of Tennessee Communications Research Center--for the National Association of Broadcasters, 1982) p.4

1985 - Herbert H. Howard, Group and Cross-Media Ownership of Television Stations: 1984. (Washington: National Association of Broadcasters, 1984), p. 5.

increase in the number of new UHF facilities. Last year also saw a significant increase in the number of groups holding the maximum number of seven TV stations. This development and other current trends will be explored in this report.

The second aspect of this study focuses on newspaper ownership of television stations. In 1973, when the FCC examined the cross-media ownership issue, 16.1% of the commercial TV stations in the top-100 markets (60 of 372) were either licensed to or affiliated in ownership with a local daily newspaper.[9] By 1984, a dramatic decline in same market ownership had occurred while overall newspaper-television affiliations had increased. Only 32

TV stations, or 6.3% of the 509 outlets in the top-100 markets, were affiliated then with co-located daily newspapers.[10] However, 169 of those 509 stations, or 33.2%, were newspaper-related, compared with 28.0% in 1973.[11] This trend reflects the tendency of media companies to do business in both broadcast and print enterprises.

Method of Study

This study is based on a tabulation of new data on the ownership of television stations in the United States as of January 1, 1985. The author maintains files of TV station ownership which are continuously updated from FCC announcements of license transfers published in Broadcasting and other trade magazines, with further verification of ownership changes by direct contact with stations involved. The 1985 Broadcasting-Cablecasting Yearbook[12] and Television Factbook No. 53 [1985 ed.][13] provided further verification of station holdings. Television Factbook also was the source of Arbitron's weekly circulation data. Percentages of the nation's TV households in each group's markets were obtained from Arbitron Ratings/Television[14] (1984-85 Universe Estimates Summary).

The various tables presented here use as a base the 559 TV stations (295 VHF and 264 UHF) determined to be operational in the 100 largest U. S. markets. Market rankings are those published by The Arbitron Company for 1984-85.[15] This list, based on the number of TV households in each ADI market area, is revised annually, resulting in slight changes from year-to-year in the composition of the top-100 markets.

The Findings

Based on the data examined, group ownership of television stations continued its long-term expansion during 1984. Within the top-100 markets, 421 stations were group-owned on January 1, 1985, compared to 374 on the same date in 1984.[16] This increase of 47 stations, or 12.5%, occurred during a year in which the number of TV stations in the 100 largest markets increased from 509 to 559. This increase resulted mainly from the proliferation of new UHF independent stations, with some additional adjustment from the year-to-year shifting of markets at the lower margin of the top-100 rankings.

Not only did group ownership increase numerically, it also gained on a percentage basis during 1984. Overall, 421, or 75.3% of the 559 VHF/UHF stations operating in the top-100 markets, were licensed to various group owners on January 1, 1985. Thus a slight percentage increase occurred over the 73.5% of the previous year. However, the number remains below the all-time high figure of 79.0% recorded in 1982.[17]

Collectively, the groups continued to operate more than 85.0% of the VHF stations in the top-100 markets [86.8% in 1985 vs. 83.9% in 1984]. Group ownership of UHF stations increased dramatically, from 134 to 165, with a percentage gain from 60.1% to 62.5%.

As shown in Table 1, group ownership predominates at every level within the top-100 markets for both VHF and UHF stations. Despite the prevalence of multiple station ownership, a significant degree of diversity exists. More than 100 different groups are included among the 421 group-owned stations in the 100

largest markets. Furthermore, in markets of all sizes, some 180 different groups (excluding those that operate satellite transmitters exclusively as repeater stations) owned completely or partially the licenses to 660 stations, an average of 3.7 stations per group.

TABLE 1

GROUP OWNERSHIP OF TV STATIONS BY MARKET RANK

January 1, 1985

Market Rank	VHF No.	VHF G/O	VHF %	UHF No.	UHF G/O	UHF %	VHF & UHF No.	VHF & UHF G/O	VHF & UHF %
1-10	42	41	97.6	57	34	59.6	99	75	75.8
1-25	99	91	91.9	101	65	64.4	200	156	78.0
26-50	64	59	92.2	65	41	63.1	129	100	77.5
51-75	78	62	79.5	48	26	54.2	126	88	69.8
76-100	54	44	81.5	50	33	66.0	104	77	74.0
1-100	295	256	86.8	264	165	62.5	559	421	75.3

Table 2 shows the number of groups that held the various numbers of TV stations allowed under the FCC's "7-7-7 rule," which was still in effect on January 1, 1985. Significantly, the number of owners holding the maximum of seven stations increased from 12 to 17 during 1984, reflecting renewed interest in expansion, including ownership of UHF properties.

TABLE 2

GROUP OWNERSHIP BY NUMBER OF TV STATIONS

January 1, 1985

Stations Held	No. Groups	No. Stations
7	17	119
6	11	66
5	20	100
4	33	132
3	45	135
2	54	108
	TOTAL: 180 (1)	660 (2)

(1) Excludes 11 satellite-only groups (26 stations).

(2) Ownership of 7 stations is shared by 2 or more owners. Therefore 653 different stations are included in this number.

Table 3 shows the highest and lowest rankings for groups with seven, six, five, four, three, and two stations respectively. Disparities between groups with equal numbers of stations are quite apparent. Although the highest ranking group has seven stations, another full-complement owner trails 76 other chains, most of which have fewer than seven stations. One three-station group outranks all but one of the 17 seven-station groups.

In addition to the number of stations held, a group's economic potential also depends upon the number of viewers its stations are capable of reaching (determined by market size and coverage), and the overall attractiveness of the programming offered. Therefore, a more meaningful comparison should take into account the audience reach of the stations involved.

TABLE 3

HIGH AND LOW CIRCULATION DATA ON TV GROUPS (1985)*

No. Stations	Highest Rank	Lowest Rank
Seven	1	77
Six	6	52
Five	2	110
Four	20	163
Three	7	171
Two	41	175

* groups with complete circulation data

As in our previous reports, Arbitron's net weekly circulation (NWC) data have been used to determine the total weekly circulation of each TV group. Using the NWC data published in Television Factbook No. 53 (1985), an audience profile was developed for each of the 180 identified TV groups based on their station holdings on January 1, 1985. These groups, ranked according to their total weekly circulation are shown in Appendix A.[19] The total percentage of the nation's TV households in each group's respective markets, based on the FCC's 25% formula, also are included for the first time. Appendix B lists the 100 largest ADI areas with their percentages of national TV households, the data used by the FCC to compute market percentages toward the 25% ceiling. With these data, one may be able to "predict" what stations a newly merged group could divest to meet the 25% rule.

Further analysis of the Arbitron NWC data for the 180 television groups reveals the following industry profile:

1) No individual group reaches more than 20% of the nation's estimated 85,000,000 television households (1984-85). Only five groups reach as much as 15%, and only seven groups serve 10% to 20% of the nation's TV homes. These firms include the three network owned-and-operated (O&O) groups and four large independent chains. Metromedia again emerged as the group with the largest circulation (19.0%), followed by ABC (18.5%), CBS (18.2%), and Tribune Co. Broadcasting (17.9%). The latter group attains circulation throughout the country from WGN-TV, its Chicago "super station." The three remaining groups exceeding 10% national penetration include NBC (17.9%), Westinghouse (11.1%), and RKO General (10.7%).

2) Thirteen groups reach between 5% and 10% of the nation's TV households.[20] Sixteen groups reach between 2.5% and 5.0% of the estimated 85 million TV households, while 43 groups reach between 1.0% and 2.5%. Finally, 101 groups, or more than half (56%) of the total number of multiple-station licensees, reach less than 1.0% of the nation's television households each week. Of these 101 smaller broadcast firms, 75 have a weekly circulation of less than 500,000 households (0.6%) and 36 groups reach fewer than 250,000 homes (0.3%) on a weekly basis. The smallest group for which NWC data were available attracts only 30,500 viewing households weekly to its two stations.

The 25 highest ranking groups based on the FCC's new 25% formula are shown in Table 4. Household reach figures for all groups using the FCC formula are given in Appendix A. These

percentages of the nation's TV households reached will determine how much growth any group may experience from the acquisition of additional TV stations, up to the new limit of 12 stations and 25% of the nation's television households. Four groups either slightly exceed or closely approach 20% coverage of the national TV market. Four others fall between 10% and 14%, while 12 groups reach 5% to 10% of the U.S. market.

Noticeable differences exist between the rankings of groups based on the FCC formula and those based on net weekly circulation. Even so, 21 group owners appear on both lists of the 25 largest multiple station licensees. Differences between the two ranking systems result from such factors as (1) extensive cable carriage of certain independent TV stations; (2) ownership of several large market independent stations that engage in ethnic and religious specialty programming; and (3) ownership of large market stations that have not yet been fully developed.

TABLE 4

PERCENTAGES OF NATION'S TV HOUSEHOLDS REACHED BY 25 LARGEST GROUPS USING FCC FORMULA

(January 1, 1985)

Rank	Owner	No. Stations	% Nation's TVHH
1.	ABC	5	20.76%
2.	CBS	5	20.59
3.	Metromedia	7	20.38
4.	NBC	5	19.79
5.	RKO General	3	13.50
6.	Tribune Co.	5	13.46
7.	KKR (Wometco)	7	13.04
8.	Westinghouse	6	10.50
9.	United/Chris Craft	6	9.89
10.	Spanish International	7	9.31
11.	Trinity	6	8.20
12.	Cox	7	8.15
13.	Capital Cities	7	7.83
14.	Storer	7	7.79
15.	Gaylord	7	7.11
16.	Taft	7	6.71
17.	Gannett	7	6.63
18.	A. H. Belo	5	5.65
19.	Harriscope	6	5.05
20.	Outlet	7	5.00
21.	Post-Newsweek	4	4.70
22.	Times-Mirror	7	4.69
23.	Hearst	5	4.64
24.	Scripps-Howard	6	4.54
25.	Lin	7	4.45

Cross-Media Ownership

Two significant trends have prevailed for several years with respect to newspaper ownership and affiliation with television stations. First, there has been a steady increase in newspaper-television ownership as media companies have expanded in both the print and broadcast fields. Second, a marked decline has occurred in instances of local cross-media ownership of TV stations and daily newspapers in the top-100 markets.

As shown in Table 5, 168 of the 559 stations in the top-100 markets were newspaper related at the beginning of 1985. This represents one less newspaper-affiliated TV station than a year ago. With the increased number of television stations broadcasting in 1985, the percentage dropped from 33.2% to 30.1%. Second, the number of instances of local cross-media ownership of TV stations and daily newspapers in the top-100 markets

TABLE 5

NEWSPAPER OWNERSHIP OF U.S. TELEVISION STATIONS

January 1, 1985

MARKET RANK	VHF			UHF			VHF & UHF		
	Total	No.	%	Total	No.	%	Total	No.	%
1-10 (1)	42	14	33.3	57	4	7.0	99	18	18.2
1-25 (2)	99	39	39.4	101	9	8.9	200	48	24.0
26-50 (3)	64	33	51.6	65	11	16.9	129	44	34.1
51-75 (4)	78	36	46.2	48	5	10.4	126	41	32.5
76-100 (5)	54	24	44.4	50	11	22.0	104	35	33.7
1-100 (6)	295	132	44.7	264	36	13.6	559	168	30.1

NOTES:
1) 5 VHF stations are cross-owned with local newspapers in the top-10 markets.
2) 9 VHF stations are cross-owned with local newspapers in markets 1-25.
3) 8 VHF and 1 UHF stations are cross-owned with local newspapers in markets 26-50.
4) 5 VHF stations are cross-owned with local newspapers in markets 51-75.
5) 6 VHF and 2 UHF stations are cross-owned with local newspapers in markets 76-100.
6) 28 VHF and 3 UHF stations are cross-owned with local newspapers in the top-100 markets.

declined by one during 1984. On January 1, 1985, only 31 stations, a mere 5.5% of the 559 television outlets in those markets, were involved in local cross-media ownerships. On a long-term basis, this represents a significant decline of 29 stations since 1975 when 60 stations, or 16.1% of those in the top-100 markets, were commonly owned with local dailies. With only three exceptions, the remaining 31 newspaper/television cross-ownerships involve VHF station properties.

It appears, at least for 1984, that the two major trends involving newspaper-TV ownership have stabilized.

ENDNOTES

1 50 F.R. 4666 (1985).

2 Amendment of Multiple Ownership Rules, 9 R.R. 1563 (1953); Television Multiple Ownership Rule Amended, 1 R.R. 1519 (1954).

3 50 F.R. 4666 at 4667.

4 50 F.R. 4666 (1985).

5 Report and Order (Docket No. 83-1009), FCC 84-350, 49 F.R. 31877 (1984).

6 The final order also includes a proviso that a group may acquire up to 14 broadcast facilities (radio or television), provided at least two of the stations in the portfolio are minority-controlled.

7 FCC Order 84-A (1943); FCC Order 84-B (1944).

8 Second Report and Order (Docket 18110), 32 R.R. 2d 954 (1975).

9 Herbert H. Howard, Group and Cross-Media Ownership of Television Stations: 1984. (Washington: National Association of Broadcasters, 1984), p. 11.

10 Ibid., p. 12.

11 Ibid., p. 12.

12 1985 Broadcasting-Cablecasting Yearbook. (Washington: Broadcasting Publications, Inc., 1985).

13 Television Factbook No. 53. (Washington: Television Digest, Inc., 1985).

14 Arbitron Ratings/Television (1984-85 Universe Estimates Summary). (New York: Arbitron Ratings Company, 1984).

15 ADI Market Rankings 1984-85. (New York: The Arbitron Co., 1984). The composition of the top-100 markets varies slightly from year to year due to different growth rates among the markets and the shifting of "swing" counties from one market to another. For analytical purposes, however, the effect of these differences is negligible.

16 Numerous changes of ownership of television stations occurred just before and just after January 1, 1985. Data on the 30 highest-ranking groups include the following 1984 acquisitions: WKBD-TV, Detroit, by Cox Communications; WFTS-TV, Tampa-St. Petersburg, by Capital Cities Communications; WATL-TV, Atlanta, and WPDS-TV, Indianapolis, by Outlet Company; KESQ-TV, Palm Springs, KTXA (TV), Dallas-Fort Worth, and KTXH, Houston, by Gulf Broadcasting; and KCCI-TV, Des Moines, and WESH-TV, Orlando-Daytona Beach, by H & C Communications. The sale of KNXV, Phoenix, to Scripps-Howard was completed after January 1, 1985, and therefore was not included.

17 Herbert H. Howard, Television Station Group Ownership and Cross-Media Ownership: 1982. (Knoxville: The University of Tennessee Communications Research Center for the National Association of Broadcasters, 1982), p. 4.

18 The five groups to attain the maximum number of TV stations in 1984 were Adams TV, Capital Cities, Cox, Outlet, and KKR. The 12 others holding the limit of seven TV properties are Bahakel, Gaylord, Lin, Meredith, Metromedia, Park, Pulitzer, Standard, Spanish International, Storer, Taft, and Times-Mirror.

19

New groups appearing in 1985 include Providence Journal (39), Spartan Radio (69), Backe (93), NEP Communications (103), Lamco (115), Beverly Hills Hotel Corporation (116), Channel Communications (125), and Pappas TV (127). Gillette Communications returned to 51st place after its acquisition of the Post Co. stations. Other significant gains in rank were recorded by Cox (8), KKR (14), Gulf Broadcasting (24), H & C Communications (26), Viacom (37), TV Station Partners (42), Adams TV (43), Odyssey Partners (62), Milwaukee Journal (65), and Arlington (74).

20

Groups reaching between 5% and 10% of the nation's TV households on a net-weekly-circulation basis include Cox (9.2%), Storer (9.1%), Taft (8.3%), United/Chris Craft (8.1%), Gaylord (8.1%), Capital Cities (7.8%), KKR (Wometco) (7.1%), Gannett (6.5%), Hearst (5.5%), Scripps-Howard (5.4%), A. H. Belo (5.3%), Times-Mirror (5.1%), and Post-Newsweek (5.0%).

APPENDIX A

TV STATION GROUPS RANKED BY NET WEEKLY CIRCULATION
WITH FCC FORMULA TV HOUSEHOLD COVERAGE (1-1-85)

Group Owner	Rank 1985	Rank 1984	No. of St'ns	Net Weekly Circulation	Percent of U.S. TV Households NWC	Percent of U.S. TV Households FCC
Metromedia	1	1	7	16,161,600	19.0	20.38
ABC	2	2	5	15,743,300	18.5	20.76
CBS	3	3	5	15,452,100	18.2	20.59
*Tribune Co.	4	5	5	15,188,900	17.9	13.46
NBC	5	4	5	15,167,200	17.8	19.79
Westinghouse	6	6	6	9,395,600	11.1	10.50
RKO General	7	7	3	9,112,800	10.7	13.50
*Cox	8	12	7	7,800,400	9.2	8.15
Storer	9	8	7	7,708,800	9.1	7.79
Taft	10	10	7	7,015,100	8.3	6.71
United/ Chris Craft	11	21	6	6,904,000	8.1	9.89
*Gaylord	12	9	7	6,854,300	8.1	7.11
*Capital Cities	13	11	7	6,657,200	7.8	7.83
KKR (Wometco)	14	31	7	6,000,300	7.1	13.04
*Gannett	15	13	6	5,487,600	6.5	6.63
*Hearst	16	14	5	4,651.200	5.5	4.64
*Scripps-Howard	17	15	6	4,585,200	5.4	4.54
*A. H. Belo	18	20	5	4,463,900	5.3	5.65
*Times-Mirror	19	16	7	4,317,400	5.1	4.69
*Post-Newsweek	20	17	4	4,236,600	5.0	4.70
Outlet	21	23	7	4,149,800	4.9	5.00
Lin	22	18	7	4,004,500	4.7	4.45

*Meredith	23	19	7	3,957,900	4.7	3.25
Gulf Bcstg.	24	37	6	3,623,800	4.3	4.44
*Pulitzer	25	24	7	3,452,500	4.1	3.15
H & C Communic.	26	35	5	3,233,700	3.8	3.99
*Albritton	27	26	5	3,022,700	3.6	3.44
*Knight-Ridder	28	25	6	2,985,600	3.5	3.07
*Evening News Association	29	27	5	2,974,800	3.5	3.43
Cosmos	30	28	6	2,728,300	3.2	2.50
*Multimedia	31	29	5	2,693,600	3.2	3.10
*Chronicle Broadcasting	32	30	4	2,674,500	3.1	3.33
McGraw-Hill	33	32	4	2,537,300	3.0	3.03
King	34	33	4	2,345,300	2.8	2.81
Hubbard	35	34	5	2,302,800	2.7	2.48
*Park	36	36	7	2,207,500	2.6	2.20

GROUPS WITH 1.0% TO 2.5%
PENETRATION OF THE U.S. TV MARKET

Viacom	37	41	4	1,914,700	2.3	1.98
CBN	38	38	3	1,859,200	2.2	2.32
*Providence Journal	39	---	4	1,858,100	2.2	2.28
*Harte-Hanks	40	39	4	1,823,000	2.1	1.97
Fisher	41	40	2	1,819,500	2.1	2.25
TV Station Partners	42	53	5	1,805,900	2.1	1.37
Adams TV	43	117	7	1,788,300	2.1	1.27
Kelly	44	42	2	1,659,400	2.0	2.39
Malrite	45	49	4	1,582,500	1.9	1.08
*Bonneville	46	44	2	1,564,400	1.8	1.98

*Columbus Dispatch	47	46	2	1,562,600	1.8	1.66
*Lee Enterprises	48	43	4	1,553,900	1.8	1.69
*Media General	49	47	3	1,552,800	1.8	1.65
Midwest R & TV	50	45	3	1,550,200	1.8	1.78
Gillette	51	—	5	1,508,000	1.8	1.45
*Forward	52	48	6	1,412,100	1.7	0.94
Koplar	53	54	2	1,391,600	1.6	1.75
Gateway	54	50	4	1,371,500	1.6	1.44
American Family	55	51	5	1,337,100	1.6	1.32
*Freedom Newspapers	56	52	4	1,324,900	1.6	1.33
*Standard Comm.	57	56	7	1,304,300	1.5	1.34
Bahakel	58	57	7	1,300,700	1.5	1.09
Midwest TV	59	55	3	1,295,900	1.5	1.42
Camellia City	60	70	3	1,293,000	1.5	1.56
SFN (Western)	61	94	4	1.239.500	1.5	1.24
Odyssey Partners (2)	62	104	4	1,221,800	1.4	1.52
Nationwide	63	60	3	1,177,400	1.4	1.43
*New York Times	64	61	3	1,132,400	1.3	0.96
*Milwaukee Journal	65	72	3	1,123,200	1.3	1.18
Commercial Radio Institute (2)	66	65	3	1,093,000	1.3	1.59
Rollins	67	62	3	1,084,500	1.3	1.35
*Jefferson-Pilot	68	63	2	1,080,500	1.3	1.28
Spartan Radio	69	—	3	1,079,700	1.3	1.03
*Eve. Telegram	70	67	5	1.032,600	1.2	0.96
Wilson	71	78	3	994,400	1.2	1.39

Fetzer	72	69	4	951,700	1.1	1.04
Loyola U. (S.)	73	71	2	943,100	1.1	0.98
Arlington (Lasky)	74	84	4	931,900	1.1	2.30
*South Bend Tribune	75	75	3	908,000	1.1	0.69
*Guy Gannett	76	73	3	900,600	1.1	0.88
Spanish Int'l.	77	74	7	885,600	1.0	9.31
Palmer	78	77	3	878,500	1.0	1.03
TVX Group (Va.)	79	96	5	878,100	1.0	1.54

GROUPS WITH LESS THAN 1.0% PENETRATION

*Quincy Newspapers	80	79	4	815,700	0.9	0.65
Harriscope (1) (2)	81	66	6	790,700	0.9	5.05
Ackerley	82	80	3	766,400	0.9	0.75
Charles Woods	83	64	4	757,600	0.9	1.12
Balaban/Plains	84	81	3	747,600	0.9	1.14
*Clay	85	82	4	738,300	0.9	0.70
*Landmark	86	88	2	724,300	0.9	2.67
Liberty	87	85	5	722,400	0.8	0.58
*News Press/ Gazette	88	83	3	695,300	0.8	0.72
Gilmore	89	87	3	684,200	0.8	0.58
Bostick/LBJ	90	92	4	679,900	0.8	0.59
May Co.	91	91	2	674,500	0.8	0.73
Blair TV (1)	92	95	5	667,100	0.8	1.49
Backe Communic.	93	—	2	659,400	0.8	0.44
Glazier	94	89	3	658,100	0.8	0.84
*Birney Imes	95	97	4	618,500	0.7	2.75

Buford (1)	96	93	5	609,900	0.7	1.16
*Gray	97	98	3	587,900	0.7	0.45
*Manship	98	102	2	580,300	0.7	0.51
*Toledo Blade	99	100	3	576,400	0.7	0.36
David Smith (2)	100	108	2	570,300	0.7	0.89
*Charleston Evening Post	101	105	3	543,900	0.6	0.68
Harron	102	99	2	539,900	0.6	0.49
NEP Communic.	103	——	2	539,600	0.6	0.31
J. C. Lewis	104	107	3	505,500	0.6	0.38
Benedek (2)	105	76	3	501,500	0.6	0.21
*Stauffer	106	123	3	496,600	0.6	0.48
R. Dudley (2)	107	103	2	489,400	0.6	0.43
Maine Bcstg.	108	106	2	488,300	0.6	0.51
Sarkes Tarzian	109	109	2	485,000	0.6	0.53
*Fargo Forum	110	111	5	464,700	0.5	0.52
Retlaw	111	110	2	458,200	0.5	0.34
Precht (Eagle)	112	160	4	457,900	0.5	0.49
F. H. Spain	113	113	4	452,400	0.5	0.50
Gay-Bell	114	114	2	448,700	0.5	0.28
*Lamco Comm. (Grit)	115	——	2	439,100	0.5	0.36
Beverly Hills Hotel Corp.	116	——	2	437,500	0.5	1.04
Price (Mid America)	117	116	2	416,000	0.5	0.28
McKinnon (2)	118	125	3	412,200	0.5	0.56
Devonshire Capital	119	118	2	397,800	0.5	0.45
Kansas Bcstg. (Beach-Schmidt)	120	119	4	391,500	0.5	0.50

Marsh Media	121	121	4	390,900	0.5	0.47
Great Trails	122	122	2	387,200	0.5	1.01
Eugene TV (2)	123	120	4	377,000	0.4	0.37
Central Minn.	124	124	3	371,600	0.4	0.32
Channel Comm.	125	---	2	368,100	0.4	0.17
Carson Comm.	126	127	2	361,000	0.4	0.48
Pappas TV (1)	127	---	2	348,600	0.4	0.58
Green Group	128	130	3	341,900	0.4	2.13
*Register Bcstg	129	126	3	338,000	0.4	0.40
*Home News	130	131	2	332,600	0.4	0.27
*Worrell (1)	131	129	3	326,600	0.4	0.15
Cal-Oregon (2	132	128	4	325,500	0.4	0.49
R. H. Drewry	133	114	2	311,100	0.4	0.40
Mid-Atlantic	134	---	2	308,900	0.4	0.25
Roy Hess (1)(2)	135	138	2	307,200	0.4	0.45
Oak Comm. (2)	136	101	2	302,800	0.4	4.34
Cary Jones (2)	137	144	2	299,200	0.4	0.47
*Capitol (Lanford)	138	132	3	295,300	0.3	1.08
MMT Sales	139	---	2	290,200	0.3	0.34
Shamrock (1)	140	133	4	286,400	0.3	0.19
S.L.J., Inc.	141	136	4	273,700	0.3	0.34
Columbia Empire	142	151	3	269,900	0.3	0.20
U. S. Communi-cations	143	---	3	267,500	0.3	0.73
Diversified	144	134	2	261,500	0.3	0.18
Media Central (Kent) (1)	145	165	6	249,600	0.3	1.78

Meridian Group (1)	146	—	2	246,700	0.3	0.59
Caprock	147	135	2	245,400	0.3	0.26
Pikes Peak	148	142	2	242,500	0.3	0.31
K.E. Meyer	149	155	2	240,900	0.3	0.27
Beam	150	141	3	229,300	0.3	0.19
Cannan (2)	151	—	2	218,600	0.3	0.38
Sante Fe (1)	152	156	3	209,500	0.2	2.80
R. E. Shively	153	154	4	205,700	0.2	0.34
Seaway	154	143	2	205,400	0.2	0.32
N.W.G. Bcstg.	155	145	3	198,900	0.2	0.10
Dakota Bcstg.	156	147	3	195,800	0.2	0.38
Le Sea Bcstg.	157	149	2	188,800	0.2	0.62
*United Comm.	158	148	2	180,000	0.2	0.12
Burke	159	150	4	156,800	0.2	0.10
Hi-Ho	160	152	3	155,900	0.2	0.22
Meyer (N.D.)	161	155	4	145,100	0.2	0.17
McAlister TV	162	153	2	143,400	0.2	0.10
Mark III (1)	163	—	2	142,800	0.2	0.43
Duhamel	164	158	4	125,200	0.1	0.11
Bismarck TV	165	159	3	118,500	0.1	0.17
G. T. Hernrich	166	139	2	114,100	0.1	0.08
Ray Moran	167	—	2	109,400	0.1	0.20
Schindler	168	161	2	106,200	0.1	0.13
XYZ-TV	169	162	3	87,200	0.1	0.07
Carolina Christian (1)	170	164	4	75,500	0.09	0.70
Northern Plains	171	166	3	69,200	0.08	0.27
Trinity (1)	172	157	6	59,200	0.07	8.20

Sainte Bcstg.	173	168	2	41,800	0.05	0.64
Satellite Syn. cated System	174	167	2	30,500	0.04	1.24
National Cap. Christian (1)	175	169	2	26,200	0.03	1.14
Focus Comm. (1)	176	---	3	22,600	0.03	2.48
Alaska 13	177	169	3	N. A.	----	N.A.
American Colonial	177	169	2	N. A.	----	N.A.
Faith Center	177	169	2	N. A.	----	1.68
Northern TV	177	169	2	N. A.	----	N.A.

Total Number of Groups--Exclusive of Satellite-Only Group Operations: 180

NOTES:

(1) Circulation data for one or more stations were not available.

(2) Ownership of one or more stations is shared with another group.

* Designates groups that are owned by or affiliated with a newspaper publishing company.

APPENDIX B

1984-85 ADI MARKET RANKINGS
AND PERCENT OF U.S. TV HOUSEHOLDS
TOP-100 MARKETS

1984-85 Arbitron Television Markets and Ranking Guide

ADI Rank	Market Name	% of U.S.
1	New York	7.72
2	Los Angeles	5.13
3	Chicago	3.55
4	Philadelphia	2.97
5	San Francisco	2.42
6	Boston	2.28
7	Detroit	1.94
8	Dallas-Ft. Worth	1.77
9	Washington, D. C.	1.75
10	Houston	1.69
11	Cleveland	1.64
12	Pittsburgh	1.44
13	Minneapolis-St. Paul	1.36
14	Miami	1.36
15	Atlanta	1.34
16	Seattle-Tacoma	1.33
17	St. Louis	1.22
18	Tampa-St. Petersburg	1.19
19	Denver	1.15
20	Sacramento-Stockton	1.06
21	Baltimore	1.01
22	Hartford-New Haven	.94
23	Phoenix	.93
24	Portland, OR	.92
25	Indianapolis	.92
26	San Diego	.88
27	Cincinnati	.84
28	Kansas City	.82
29	Milwaukee	.81
30	Orlando-Daytona Beach-Melbourne	.79
31	Nashville	.76
32	Charlotte	.76
33	New Orleans	.75
34	Columbus, OH	.74
35	Buffalo	.72
36	Oklahoma City	.71
37	Greenville-Spartanburg-Asheville	.70
38	Raleigh-Durham	.69
39	Providence-New Bedford	.66
40	Grand Rapids-Kalamazoo-Battle Creek	.66

41	Memphis	.65
42	Salt Lake City	.65
43	Charleston-Huntington	.62
44	San Antonio	.62
45	Louisville	.61
46	Norfolk-Portsmouth-Newport News-Hampton	.59
47	Birmingham	.59
48	Harrisburg-York-Lancaster-Lebanon	.58
49	Dayton	.56
50	Wilkes Barre-Scranton	.56
51	Greensboro-Winston Salem-High Point	.56
52	Albany-Schenectady-Troy	.56
53	Shreveport-Texarkana	.54
54	Tulsa	.54
55	Richmond (Charlottesville)	.52
56	Little Rock	.51
57	Wichita-Hutchison	.50
58	Flint-Saginaw-Bay City	.50
59	Knoxville	.49
60	Toledo	.48
61	Mobile-Pensacola	.48
62	West Palm Beach	.46
63	Jacksonville	.46
64	Albuquerque	.46
65	Fresno-Visalia	.45
66	Des Moines	.43
67	Syracuse	.43
68	Green Bay	.42
69	Roanoke-Lynchburg	.41
70	Springfield-Decatur-Champaign	.41
71	Rochester, NY	.41
72	Omaha	.41
73	Paducah-Cape Girardeau-Harrisburg-Marion	.40
74	Davenport-Rock Island-Moline	.40
75	Spokane	.38
76	Lexington	.37
77	Cedar Rapids-Waterloo-Dubuque	.37
78	Portland-Poland Spring	.37
79	Johnstown-Altoona	.35
80	Chattanooga	.34
81	Austin, TX	.34
82	Springfield, MO	.33
83	Tucson	.32
84	Jackson, MS	.32
85	South Bend-Elkhart	.32
86	Bristol-Kingsport-Johnson City	.32
87	Evansville	.31
88	Columbia, SC	.31
89	Baton Rouge	.30
90	Lincoln-Hastings-Kearney	.30

91	Huntsville-Decatur-Florence	.30
92	Youngstown	.28
93	Sioux Falls-Mitchell	.27
94	Springfield, MA	.27
95	Waco-Temple	.27
96	Ft. Wayne	.27
97	El Paso	.26
98	Peoria	.25
99	Greenville-New Bern-Washington	.25
99	Las Vegas	.25